

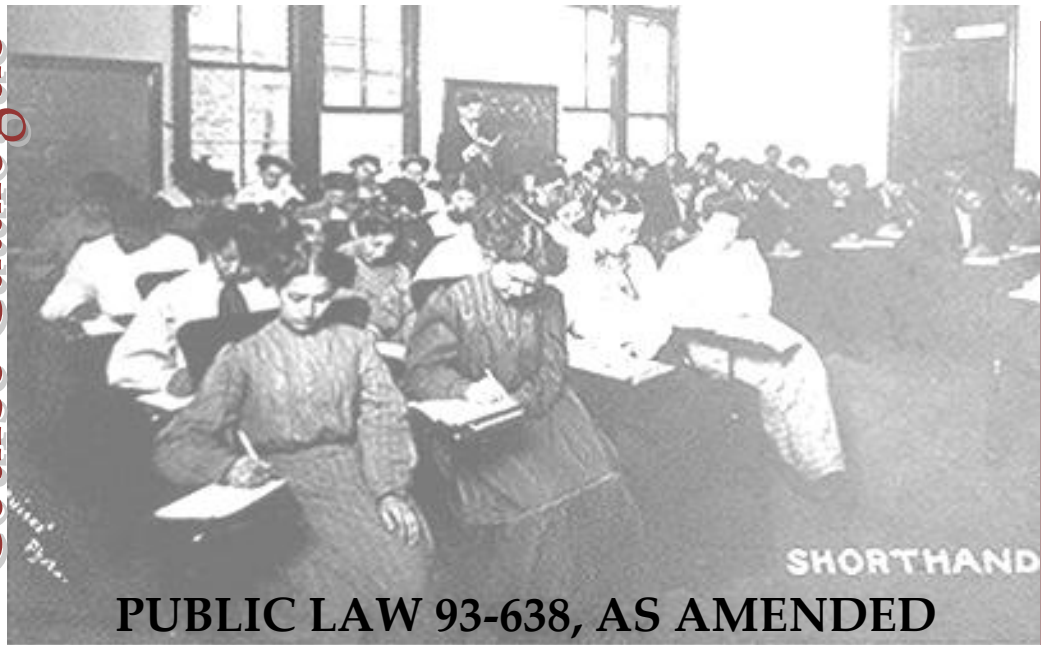


**BUREAU OF INDIAN AFFAIRS**  
**Indian Self-Determination Services**

# **FY 2012**

# **Training Handbook**

**Course Catalogue**



**PUBLIC LAW 93-638, AS AMENDED**

**INDIAN SELF-DETERMINATION AND  
EDUCATION ASSISTANCE ACT OF 1975**

**AND  
CONTRACT RELATED COURSES**

**ISSUE DATE: 2011**

# **PUBLIC LAW 93-638**

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## GENERAL INFORMATION

### **WHY WE TRAIN**

We train in order to ensure that all Bureau of Indian Affairs (Bureau), other Federal Agencies, and Tribal personnel are provided the opportunity to receive training in Public Law 93-638 (The Indian Self-Determination and Education Assistance Act of 1975), as Amended. We train to ensure that all Bureau employees charged with the responsibility of carrying out the purpose and intent of the Act are provided training. We train to prepare those Bureau employees responsible for all facets in the administration of contracts and grants awarded under the Act do so consistent with applicable laws, rules, and regulations. We train to enable guidance and technical assistance to tribes and tribal staff in order to promote common understanding of the law, regulations, and intent of programs, and acquaint tribal staff and officials of the opportunities for innovative program design, skill development and operation under the Act.

The training curriculum is designed to meet the Self-Determination training requirements established for Approving Officials, and Level I and Level II Awarding Officials. Courses are designed to satisfy the needs of Line Officers when functioning as Approving Officials and Self-Determination staff delegated authority and certified as Awarding Officials. This Self-Determination Training guide includes information for furthering continuing education, or maintenance of required courses to allow Bureau, Federal and Tribal staffs to enhance their knowledge, skills, and abilities in contract administration and assist certified Awarding Officials in maintain their certification. Courses listed in support of the Awarding Official training requirements are so identified.

The Indian Self-Determination Services (ISDS) encourages Self-Determination and Tribal staff to also attend *Federal Acquisition* courses, specifically those that are Federal Acquisition Institute (FAI) approved.

**NOTE:** See the Awarding Official Certification System (AOCS) Handbook for education, experience and training requirements for Level I and II Awarding Officials. The AOCS Handbook is available from the DSDS in the Central Office.

### **HOW TO REGISTER FOR A COURSE**

Courses are open Federal and Tribal contract and grant personnel who are directly or indirectly responsible for the design, operation and management of programs which are contractible under Public Law 93-638, as amended.

Bureau, federal and tribal employees interested in attending P.L. 93-638 training courses must contact and register with the Regional Bureau Office identified as hosting a specific course. All other courses indicating the National Indian Programs Training Center (NIPTC) should register online at DOI Learn, or contact NIPTC's registrars, Linda Romero or Ester Lopez by calling: 505-563-5404/5405.

For "Online Course" (P.L.93-638 and AOTR/SAOTR) registration information, please contact Debra Peebles at: 505-563-3677.

**Class size for each course will be limited to forty (40) participants. Persons who do not register with the host Region or the National Indian Programs Training Center cannot be assured a place in the specific course offered.**

### ***CANCELLATIONS***

Registrants unable to attend are urged to report cancellations to the respective training location at least two weeks prior to the specific course date so that substitutions can be made. Substitutions may be made until the beginning of the course.

**The ISDS reserves the right to cancel any training course. The ISDS will endeavor to notify registered participants prior to the first day of a class if a course is being cancelled.**

### ***WAITING LISTS***

In the event the number of applicants exceeds the maximum class size, a waiting list will be established for the specific course. The names on the waiting lists will be given priority for the next session of the course (if offered) within the fiscal year.

### ***TUITION/COURSE FEE***

There is no tuition or course fee to Bureau, tribal, or other agency staff for any course listed in this Handbook. **Travel and per diem expenses are the responsibility of the participant or the participant's employer.**

### ***COURSE PARTICIPANTS WITH SPECIAL NEEDS***

Registrants should provide notice of special needs; this will allow the ISDS Training Office to make any necessary arrangements prior to the commencement of the training session.

### ***LOCATION***

Host regions are encouraged to select training sites convenient for tribes within their jurisdiction. Each participant is responsible for making their own travel and hotel arrangements. A training announcement will be issued which identifies the training course, the training location, and any specific hotel accommodation arrangements, such as blocking a number of rooms and arranging special room rates.

Training sessions in Albuquerque, NM will be hosted by the National Indian Programs Training Center (NIPTC). DOI Learn and Central Office will issue training announcements of ISDS Training, with Linda Romero as contact person for registration purposes. Linda Romero is the NIPTC Registrar.

*All Courses start at 8:30 a.m. sharp.*

## ***COURSE SCHEDULE REVISIONS/ADDITIONS***

Course data and training locations are subject to change. Training participants will be informed of any revisions prior to the beginning of the training session.

## ***CERTIFICATES***

**The Regional Offices will award certificates to students who have fully attended the course and if a federal employee, achieve an 80% average on all core curriculum and/or graded material. Achieving a level of accuracy in each course assists in determining competency and the knowledge necessary toward Awarding Official certification in accordance with the Awarding Official's Certification System. Central Office West will issue Certificates for 638 courses taken at NIPTC.**

**The Regional Offices will issue retake exams for those federal personnel who do not initially pass on the first sitting. If they do not pass the second exam, their supervisor will issue a third and final attempt. They will be required to retake the course if they should not pass the third and final attempt.**

The host Regional Office will issue certificates of completion to all tribal and other participants. These certificates will document participants completion of the course, as well as completion of course needs for Awarding Official Certification. The Host Regional Office will provide the participant list and daily participant sign-in sheets for each course. The participant list shall include the name, job title, mailing address, and telephone number for each participant. The participant list and daily sign-in sheets shall be used for preparation of the certificates, and to ensure that names are legible and accurate in documentation and correct spelling for certificates.

## ***SPECIAL REQUESTS***

Special Requests for training are “unscheduled courses”. All courses listed as Basic and General courses in this handbook are available on request. Bureau Regional and Agency Offices, or Indian tribes and tribal organizations, may request a special course be provided at a location within their region through the local Bureau Office. Training site location and training material copying will be the responsibility of the requesting Bureau entity. **Submit a written request identifying the specific course and proposed dates for training to Terrence Parks, Director, Indian Self-Determination Services: [terrence.parks@bia.gov](mailto:terrence.parks@bia.gov).**

**NOTE:** Provision of training shall be subject to the availability of the instructor.

## COURSE DESCRIPTIONS FY-2011

### LEVEL I AWARDING OFFICIAL COURSES

*Training courses offered under this section will cover all aspects of Public Law 93-638, as Amended. They also cover those aspects necessary for the administration and oversight of contracts under the Act; and provide the basic training requirements for certification as a Level I awarding official. Specific training and experience requirements for certification as a Level I Awarding Official are found in the Awarding Official Certification System Handbook.*

#### REQUIRED COURSES

<p><b><i>PUBLIC LAW 93-638, AS AMENDED, AND THE IMPLEMENTING REGULATIONS (25 CFR, Chapter V, Part 900, Subparts A - P) (2½ - Day Course)</i></b></p>	<p>Training will cover sections 2 - 9 and Title I of Pub. Law 93-638, as amended, and the implementing regulations (25 CFR 900). This is a required course for new delegate Agency representatives, Awarding Officials, Agency program staff, and anyone interested in obtaining Self-Determination contracts.</p>
<p><b><i>AWARDING OFFICIAL'S TECHNICAL REPRESENTATIVE (AOTR) (2½ - Day Course)</i></b></p>	<p>Participants through lecture, discussions, and case studies will learn the role and responsibilities of the Awarding Official's Technical Representative (AOTR), and the Subordinate Awarding Official's Technical Representative (SAOTR), in the self-determination contracting process. Interaction with the Awarding Official and the Approving Official will be addressed. The AOTR/SAOTR environment as it relates to standards of conduct and ethics will also be discussed.</p> <p><b>NOTE:</b> This course is mandatory for all persons who are, or will be, identified as an AOTR or SAOTR.</p>
<p><b><i>CONTRACT ADMINISTRATION Part I&amp;II Inclusive (2½ - Day Course)</i></b></p>	<p>This course provides training on the contract administration process and procedure. Emphasis is on performance based specifications. Instruction relates regulations to internal and external administrative procedures. Participants will review and discuss Program Standards and Statement of Work, and Monitoring Plans. The course involves lecture, group discussion and assignments (case study type issues).</p> <p>This course is conducted in a workshop format. Emphasis is on the "how to" of contract administration. Instruction relates regulations to internal and external administrative procedures. Participants shall prepare and critique contract proposals and contract documents (Section 108 and Annual Funding Agreement). The course involves lecture, group discussion and assignments (case study type issues). It provides training on the contract administration process and procedure.</p>

## COURSE DESCRIPTIONS FY-2011

### LEVEL II AWARDING OFFICIAL COURSES

*Training courses offered under this section will cover all aspects of Public Law 93-638, as Amended. They also cover those aspects necessary for the administration and oversight of contracts under the Act; and with the courses required for Level I certification as a prerequisite, provide the basic training requirements for certification as a Level II awarding official. Specific training and experience requirements for certification as a Level II Awarding Official are found in the Awarding Official Certification System Handbook.*

#### REQUIRED COURSES

***CONSTRUCTION  
CONTRACTING UNDER  
PUB. LAW 93-638, AS  
AMENDED  
(25 CFR, Chapter V,  
Part 900, Subpart J)  
(2½ - Day Course)***

This course will provide in depth coverage of Construction Contracting under Pub. Law 93-638, as amended and 25 CFR, Chapter V, Part 900, Subpart J. It will include coverage on the preparation, negotiation, and award of construction contracts using the authority of Pub. Law 93-638, as amended. Development of specifications and drawings, inspection of work and performance standards will be emphasized to detail responsibilities of all parties to a contract. The course involves lecture, group discussion and case studies.

***CONTRACT DISPUTES  
ACT / ALTERNATIVE  
DISPUTES RESOLUTION  
(CDA/ADR) and APPEALS  
TRAINING***

This course through lecture, group discussion and exercises will provide participants with a basic understanding of the Contract Disputes Act and procedures, the Alternative Disputes Resolution process, and the Appeals process and procedures.



## COURSE DESCRIPTIONS FY-2012

### APPROVING OFFICIAL COURSES

*Training courses offered under this section will cover the necessary aspects of Public Law 93-638, as Amended for Line Officers. The courses are designed to cover those aspects necessary for the Line Officers to perform their duties as Awarding Officials. These courses are provided as a single training session for Line Officers, or can be attended consecutively. See note below.*

#### REQUIRED COURSES

<b><i>APPROVING OFFICIAL</i></b>	Training will cover the role, duties, and responsibilities of the Approving Official. This is a required course for Line Officers. This course is conducted with a one day AOTR brush-up training
<b><i>AWARDING OFFICIAL'S TECHNICAL REPRESENTATIVE (AOTR)</i></b>	Participants through lecture, discussions, and case studies will learn the role and responsibilities of the Awarding Official's Technical Representative (AOTR), and the Subordinate Awarding Official's Technical Representative (SAOTR), in the Self-Determination contracting process. Interaction with the awarding official and the approving official will be addressed. The AOTR/SAOTR environment as it relates to standards of conduct and ethics will also be discussed. This course is provided with a one-day Approving Official Training.

**NOTE:** The Approving Official session is mandatory for all persons who are, or will be, identified as an Approving Official.

<p><b><i>NEW!!</i></b></p> <p><b><u>TWO ONLINE COURSES</u></b></p> <p><b><i>P.L.93-638</i></b></p> <p><b><i>Awarding Official's Technical Representative/ Subordinate Official's Technical Representative</i></b></p>	<p>This year the Office of Self-Determination Services presents P.L. 93-638, as Amended, and AOTR/SAOTR online, as well as in the classroom. Students are able to take this course at their desk from their computer. Link to either online course through <i>DOI Learn</i> or by going to the Bureau of Indian Affairs website and clicking on "Organization" then clicking on "Office of Indian Services". Select "Self-Determination Services", scroll to "Online Courses" and choose either, <b>P.L.93-638, as Amended</b>, or, <b>AOTR/SAOTR</b>.</p> <p>After completing either of these courses you will be able to print out a certificate showing you have passed the final exam at 80% or better.</p> <p><i>For classroom coursework in either P.L. 93-638, or AOTR/SAOTR call your Region's Awarding Official for dates and times.</i></p>
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## COURSE DESCRIPTIONS FY-2012

### MAINTENANCE COURSES

*These courses are designed to provide increased knowledge in Federal acquisition and Pub. Law 93-638, as amended, as well as, areas identified as important to Bureau management. These courses are maintenance courses and apply to the body of knowledge available for Pub. Law 93-638 contracting.*

### GENERAL COURSES

<p><b><i>PROGRAM STANDARDS AND STATEMENT OF WORK (2½ - Day Course)</i></b></p>	<p>This course provides insight to the preparation of Program Standards and Statements of Work. Instruction relates regulations to internal and external administrative procedures. Participants will develop Program Standards and Statements of Work, and an Annual Funding Agreement. The course involves lecture, group discussion and assignments (case study type issues).</p>
<p><b><i>BASIC INDIRECT COST (2½ - Day Course) (Contract Support Course Training)</i></b></p>	<p>This course provides a basic instruction on managing Indirect Cost. Addresses terminology, OMB Circular A-87, and Indirect Cost Computation. Through lecture, case studies, and assignments participants will learn the terms used in indirect cost and the basics of managing indirect cost.</p>
<p><b><i>Direct Contract Support Policy (Contract Support Course Training) (1 - Day Course)</i></b></p>	<p>This course provides basic instruction on the Bureau of Indian Affairs Direct Contract Support Policy. Through lecture and group discussion participants will learn the purpose and intent of these documents</p>
<p><b><i>Implementation of Direct Contract Support (Contract Support Course Training) (2 - Day Course)</i></b></p>	<p>This course is intended to provide basic understanding and uniform implementation of the Bureau of Indian Affairs Direct Contract Support Policy.</p>
<p><b><i>Contract Administration Part I &amp; II Inclusive, and III (Management Systems) (2½ - Day Course)</i></b></p>	<p>The two courses are conducted in a workshop format. Emphasis is on "Management Systems" (Finance, Property, and Procurement). Instruction relates regulations to internal and external administrative procedures. Participants discuss management systems concerns. The course involves lecture, group discussion and assignments (case study type issues). It provides training on the review and monitoring of management systems aspect of contract administration.</p>

## COURSE DESCRIPTIONS FY-2012

### **BASIC COURSES**

*Training courses offered under this section provide an introduction to the Delegation of Authority process, general Federal acquisition and Public Law 93-638, as amended. These are the basic courses and are available to all Bureau of Indian Affairs, other Federal Agencies, and tribal employees.*

#### **COURSES**

<p><b><i>DELEGATE AGENCY TRAINING (Implementation of the Delegation of Signature Authority) (3 - Day Course)</i></b></p>	<p>Delegation of Authority to the Agency level is the policy of the Bureau of Indian Affairs. This course provides an overview of the delegation process and addresses delegation of signature authority for P. L. 93-638 contracts in particular. The duties and responsibilities of Agency staff under this delegation of authority will be discussed. Training follows 13 IAM, Chapter 2.</p>
<p><b><i>FEDERAL ACQUISITION PROCESS (2 - Day Course)</i></b></p>	<p>Training will provide a basic overview of the Federal acquisition process and its goals, the elements of a contract, and the basic statutes and regulations that control the Federal acquisition process. Training will discuss how P. L. 93-638, as amended, changes the normal acquisition process.</p>
<p><b><i>INTRODUCTION TO PUBLIC LAW 93-638, AS AMENDED (1 and 2 - Day Course) Prerequisite to all further Self-determination Trainings</i></b></p>	<p>Training will cover P. L. 93-638 and its major amendments (P. L. 100-472, 101-644 Title II, and 103-413). Training will provide a historical overview and introduction. There are two (2) courses addressing this subject:</p> <p>1 Day Course: For those employees with little or no continuous involvement with Pub. Law 93-638 on a daily basis. Individuals who should attend this course include: General Administration; Finance; and Budget personnel.</p> <p>2 Day Course: For those employees with continuous or on-going involvement with Pub. Law 93-638 on a daily basis. Individuals who should attend this course include: Program personnel and Contracting personnel.</p>

**PUBLIC LAW 93-638  
FY-2012 TRAINING SCHEDULE**

<b>COURSE</b>	<b>DATE</b>	<b>LOCATION</b>
<p><b>Public Law 93-638, as Amended (Law) and 25 CFR, Chapter V, Part 900, Subparts through P (Regulations)</b></p> <p><i>Recommended for: All Federal and Tribal contract and grant personnel who are directly or indirectly responsible for the design, operation and management of programs which are contractible under Public Law 93-638, as amended.</i></p>	<p><b>January 24-26, 2012</b></p>	<p><b>NIPTC</b></p>
<p><b>Approving Official Law and Regulations Awarding Official's Technical Representative</b></p> <p><b>Instructor: Debra Peebles</b></p> <p><b>Prerequisites: P.L. 93-638</b></p> <p><i>Recommended for: All Line Officers, Superintendents and Regional Directors</i></p>	<p><b>February 7-9, 2012</b></p> <p><b>April 17, 18</b></p>	<p><b>NIPTC</b></p> <p><b>Billings, MT</b></p>
<p><b>Awarding Official's Technical Representative And Subordinate Awarding Official's Technical Representative</b></p> <p><b>Instructor: Debra Peebles</b></p> <p><b>Prerequisites: P.L. 93-638</b></p> <p><i>Recommended for: All AOTR/SAOTRs requiring job certification, Federal and Tribal personnel interested in review of the Delegation of 638 Signatory Authority, and AOTR requirements.</i></p>	<p><b>March 6-8, 2012</b></p> <p><b>August 21-23, 2012</b></p>	<p><b>NIPTC</b></p>

**PUBLIC LAW 93-638  
FY-2012 TRAINING SCHEDULE**

<p style="text-align: center;"><b>Construction Contract Under P. L. 93-638, as Amended (25 CFR, Chapter V, Part 900, Subpart J)</b></p> <p style="text-align: center;"><b>Instructor: TBA</b></p> <p style="text-align: center;"><b>Prerequisites: P.L. 93-638</b></p> <p><i>Recommended for: All Federal and Tribal personnel working with Subpart J Self-determination construction Regulations.</i></p>	<p style="text-align: center;"><b>February 14-16, 2012</b></p> <p style="text-align: center;"><b>February</b></p>	<p style="text-align: center;"><b>NIPTC</b></p> <p style="text-align: center;"><b>Anchorage, Al</b></p>
<p style="text-align: center;"><b>Contract Administration I &amp; II Inclusive</b></p> <p style="text-align: center;"><b>Instructor: Debra Peebles</b></p> <p style="text-align: center;"><b>Prerequisites: P.L. 93-638</b></p> <p><i>Recommended for: All Federal and Tribal personnel requiring further guidance in the Administrative requirements in Self-determination contracting.</i></p>	<p style="text-align: center;"><b>July 24-26, 2012</b></p>	<p style="text-align: center;"><b>NIPTC</b></p>
<p style="text-align: center;"><b>Contract Administration III (Subpart F of CFR 25)</b></p> <p style="text-align: center;"><b>Instructor: Debra Peebles</b></p> <p style="text-align: center;"><b>Prerequisites: P.L. 93-638</b></p> <p><i>Recommended for: All Federal and Tribal personnel requiring further guidance in the Subpart F, Management System Regulations. Particularly tribal personnel working to develop the three required Systems.</i></p>	<p style="text-align: center;"><b>August 28-30, 2012</b></p>	<p style="text-align: center;"><b>NIPTC</b></p>

<p><b>Contract Support Costs</b></p> <p><b>Instructor:</b> <b>Ron Demaray</b></p> <p><b>Prerequisites:</b> P.L. 93-638  <b>Recommended for:</b> <i>Awarding Officials, Self-determination Specialists, AOTRs, Line Officers, Personnel working with CSC Shortfall Reports, Tribal Finance Personnel</i></p>	<p><b>March 20-22, 2012</b></p> <p><b>August 7-9, 2012</b></p>	<p><b>NIPTC</b></p> <p><b>NIPTC</b></p>
<p><b>Alternative Disputes Resolution Training (ADR)/ Circular A-123/Monitoring Tribal Programs Inclusive</b></p> <p><b>Instructor:</b> TBA</p> <p><b>Prerequisites:</b> P.L. 93-638  <b>Recommended for:</b> <i>Federal Personnel working in the Self-determination Arena, particularly Awarding Officials and their staff.</i></p>	<p><b>June 19-21, 2012</b></p>	<p><b>NIPTC</b></p>
<p><b>Single Audit/Circular A-123/Monitoring Tribal Programs Inclusive</b></p> <p><b>Instructor:</b> TBA</p> <p><b>Prerequisite:</b> P.L. 93-638</p> <p><b>Recommended for:</b> <i>All Federal and Tribal personnel requiring further guidance in the Administrative requirements in Self-determination contracting.</i></p>	<p><b>September 11-12, 2012</b></p>	<p><b>NIPTC</b></p>

**Public Law 93-638  
FY-2012 Training Schedule**

**Contact Persons for Regional Class Enrollment and Arrangements:**

<b>NAME</b>	<b>REGION</b>	<b>ADDRESS</b>	<b>TELEPHONE/FAX</b>
<b>Kirk Meyer</b>	Eastern	Eastern Regional Office 545 Marriott Drive Nashville, TN 37214	(615) 564-6962 Fax: (615) 564-6525
<b>Roy Willis</b>	Eastern Oklahoma	Eastern Oklahoma Regional Office 3100 Peak Blvd Muskogee, OK 74402	(918) 781-4646 Fax: (918) 781-4663
<b>Yvonne LaRocque</b>	Great Plains	Great Plains Regional Office 115 4 <sup>th</sup> Avenue, SE Aberdeen, SD 57401	(605) 226-7426 Fax: (605) 226-4663
<b>Frances Price</b>	Navajo	Navajo Regional Office P.O. Box 1060 Gallup, NM	(505) 863-8311 Fax: (505) 863-
<b>Nilah Devaney</b>	Northwest	Northwest Regional Office  Portland, OR	(503) 872-2867 Fax: (503) 231-6810
<b>Sunshine Jordan</b>	Pacific	Pacific Regional Office 2800 Cottage Way Sacramento, CA 95825	(916) 978-6024 Fax: (916) 978-6099
<b>Stella Corbin</b>	Rocky Mountain	Rocky Mountain Regional Office 316 North 26 <sup>th</sup> Street, Room 4051 Billings, MT 59101	(406) 247-7983 Fax: (406) 247-7566
<b>Constance Fox</b>	Southern Plains	Southern Plains Regional Office WCD Office Complex P.O. Box 368 Anadarko, OK 73005	(405) 247-1574 Fax: (405) 247-6409
<b>Lorraine Brockie</b>	Southwest	1001 Indian School Rd. NW, Albuquerque, NM 87104	(505) 563-3363 Fax: (505) 563-3060
<b>Carolyn Richards</b>	Western	Western Regional Office Indian Self-Determination Services 2600 North Central Avenue Phoenix, Arizona 85004	602-379-4189 (P) Fax: 602-379-4590
<b>Stuart Mani</b>	Mid-West	Midwest Regional Office 1 Federal Dr., Rm. 550 Ft. Snelling, MN 55111	(612) 725-4507 Fax: (612) 713-4435
<b>Dee Ayotte</b>	Alaska Region	Alaska Regional Office P.O. Box 25520 Anchorage, AK 99802-5520	(907) 271-4083 Fax: (907) 271-4083